

## eCAF / ICS Transfers

### User Manual

Client	ICS Client Base
Date	January 2013
Version	1.0

## Confidentiality / Document Control

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## Document History

Date	Version	Produced By	Comments
January 2013	1.0	Simon Hare	Created document

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## Introduction

With the release of eCAF version 6, a new transfer process has been enabled to allow transfer to and from ICS. This document sets out to define this new process and describes what a site needs to do to enable the functionality.

This new process will not replace any sites existing transfer process. A customer using the old process of transferring cases between applications will need to make certain changes to enable the new functionality to take place.

## Integration

Firstly a site needs to ensure they have the relevant integration versions installed, as otherwise this new process will not work and options will not be available.

Firstly the new functionality will only work on eCAF Application version 6 and above and ICS Application Version 7 and above. The following integration version then need to be installed:

### eCAF

- eCAF Integration 6.0.1 (or higher)
- and ICS Integration version 6.0.13 (or higher)

### ICS

- ICS Integration 7.0.4 (or higher)

If you do not have the correct integration versions installed please contact your Project Manager and request an upgrade to the relevant version.

The version information for each application can be easily identified by navigating to the *Version Information* found on the main menu.

ECAF Version Information				
Applications				
Protocol ECAF System v6.0.1HF1				
Version Information				
Version No	Patch	SQL Build	Installation Date	Comments
ICS 5.0.9	1		04-Jan-2013 09:39	
Installed Modules				
Module	Version			
Client Configuration	Doncaster 6.0.2			
ICS Integration	Liquidlogic 6.0.14			
ECAF Integration	eCAF 6.0.1			
Admin Tool	ICS Admin 3.7.14			
ECAF Admin Actions	ECAF Admin Actions 6.0.1			
My View	My View 6.0.0			

ICS Version Information				
Applications				
Protocol Childrens System v7.0				
Version Information				
Version No	Patch	SQL Build	Installation Date	Comments
ICS 7.0.1HF3	1	1	08-Jan-2013 13:37	
Installed Modules				
Module	Version			
Client Configuration	Doncaster 7.0.3			
Generic Configuration	Liquidlogic 7.0.0			
Integration	Liquidlogic 7.0.5			
Reports	7.0.2			
Admin Tool	ICS Admin 3.7.14			
ICS Admin Actions	ICS Admin Actions 7.0.2			
My View	My View 7.0.2			

## Generic Configuration

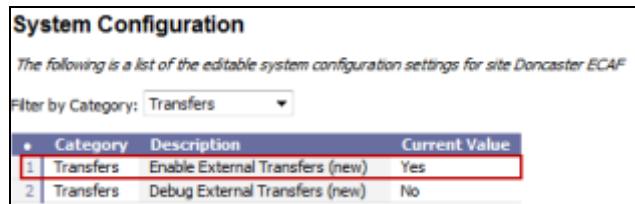
To enable the customer to set up the new transfer process Generic configuration version 7.0.2 will be needed. If a customer requires this process then please contact your Project Manager and request an upgrade to this configuration version.

## Enabling the process in eCAF

There are a number of tasks a Systems Admin worker would need to undertake to enable the process within eCAF, and these are described below.

### System Configuration Maintenance

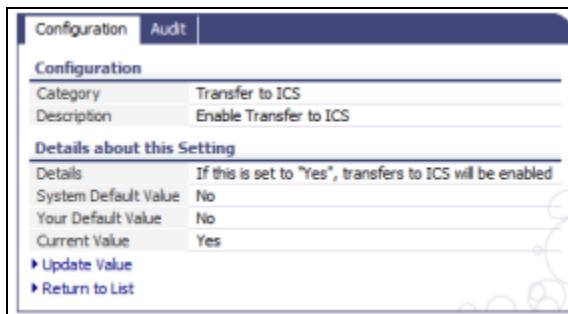
Within System Configuration Maintenance there is a category titled *Transfers*. Within this the site will need to set the *Enable External Transfers (new)* setting to Yes.



The screenshot shows a table with the following data:

Category	Description	Current Value
1 Transfers	Enable External Transfers (new)	Yes
2 Transfers	Debug External Transfers (new)	No

Customers enabling the Transfer to ICS process for the first time will also need to set the below System Configuration setting to Yes. Any site already using the Transfer to ICS process will not need to switch this on as it will already be set to Yes.

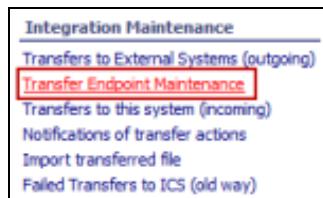


The screenshot shows the following configuration details:

Category	Transfer to ICS
Description	Enable Transfer to ICS
Details	If this is set to "Yes", transfers to ICS will be enabled
System Default Value	No
Your Default Value	No
Current Value	Yes

Buttons at the bottom: Update Value, Return to List.

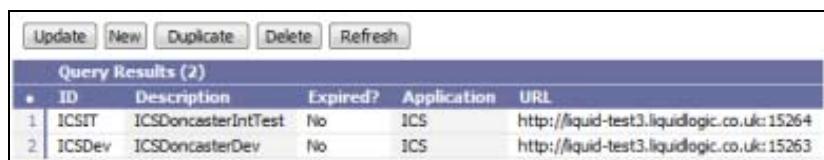
### Transfer Endpoint Maintenance



The screenshot shows the following menu options:

- Transfers to External Systems (outgoing)
- Transfer Endpoint Maintenance (highlighted with a red box)
- Transfers to this system (incoming)
- Notifications of transfer actions
- Import transferred file
- Failed Transfers to ICS (old way)

This maintenance option, accessed from the main menu, allows a customer to define the endpoint of the transfer. For customers using the transfer process already this will have entries within which show the existing endpoints.



The screenshot shows a table with the following data:

ID	Description	Expired?	Application	URL
1	ICSDoncasterIntTest	No	ICS	http://liquid-test3.liquidlogic.co.uk:15264
2	ICSDoncasterDev	No	ICS	http://liquid-test3.liquidlogic.co.uk:15263

Buttons at the top: Update, New, Duplicate, Delete, Refresh.

These can be overridden if required, and the same process should be undertaken as if creating a new Endpoint.

### Creating a new Transfer Endpoint

To create a new Transfer Endpoint, navigate to the *Transfer Endpoint Maintenance* menu option and click on *New*.

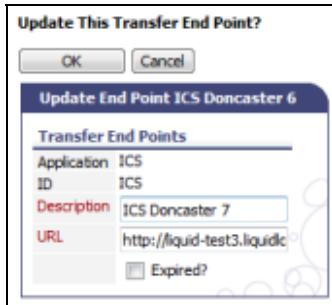


The screenshot shows the following buttons:

- Update
- New (highlighted with a red box)
- Duplicate
- Refresh

Text at the bottom: List is empty.

The details should then be filled out, similar to below:



- **Application** - The application is a drop down and will provide the available applications to choose from. This will be the application the transfer is received in.
- **ID** – This can be a brief ID made up by the customer site
- **Description** – this should be the description of the receiving application
- **URL** – this should be the URL of the receiving system, up to and including the port number

Once these details have been added click **OK** and this will then return the user to the Endpoint Maintenance screen with the entry displayed in a list view.

Query Results (3)				
*	ID	Description	Expired?	Application
	ICS	ICS Doncaster 7	No	ICS

This process is then completed.

**Note:** there should only ever be one active endpoint, if there are multiple active endpoints then the transfer will not occur as the application will not know which system to transfer to. If there are more than 1 entry, then the invalid entries should be expired.

Query Results (2)				
*	ID	Description	Expired?	Application
1	eCAF	eCAF Doncaster 6	Yes	ECAF
2	eCAF	eCAF Doncaster Trunk	No	ECAF

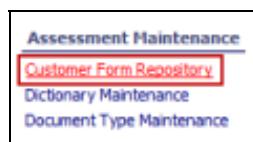
### *Adding the new Transfer Element to the form*

Once the set up has been completed the Transfer to ICS form will need to be amended to add the new transfer element in place of the existing element.

**Note:** Customer forms may be named differently, and there may be multiple forms with this element in, so all forms will need amending when using the new transfer process. For the purpose of this document the form is called *Transfer to ICS*.

### *Access the Customer Form Repository*

Firstly click on the *Customer Form Repository* link from the main menu.



When here, locate the relevant Transfer to ICS form(s) to be amended and select *Create a Customer Revision of this form*.

**Customer Form Repository**

**Registered Protocol Environments:**

Description	Application	Version	Live/Test?	Status	Details
1 Doncaster 6	ECAF	6.0.1	Test	Connected	No Issues

► Register a new Protocol Environment  
► Refresh Server Statuses and Form Templates

**Customer Forms:**

Show Non-Customer Forms  (Show Unused Form Types)

**Form Streams**

1 Action Meeting Notes
2 Action Meeting Outcomes
152 Temporary CP Transfer In Assessment
153 Transfer to ICS
154 Transfer to ICS

► Create a new Customer Form Type

**Remote Liquidlogic Form**

Environment	Doncaster 6 (6.0.1)
Form	Transfer to ICS v1 (1)
Site(s)	Doncaster ECAF
Status	Remote Liquidlogic Form

**Form Designer**

► Open in Form Designer

**New Revision**

► Create a Customer Revision of this Form - v1.2  
► Mark this Form Revision (for copying)

### Amending the form using Form Designer

The new customer revision should be opened in Form Designer. When in the form the old transfer element will need to be deleted if it exists. However, it may not exist and therefore will not need to be deleted and therefore ignore this stage and progress to the stage below.

**Transfer to ICS v1.1 (Form Designer)**

Index Undo Redo Save Export (xml) Export (xcr) Import Close

Assessment Template

- Form Type ECAF/ETransferToICS
- Assessment Form Transfer to ICS (ecaftransferform)
- Heading Transfer to ICS (TRANSFERTOICS)

WYSIWYG Editing Pane Application Briefcase XML

**Transfer to ICS**  
(Select forms and case notes to transfer to ICS when finalised, together with basic child demographics)

Transfer/Export to another System (Original Version)

Transfer Details

Date of transfer 01-Mar-2012  
Comments This is the original transfer form

Cut Copy Duplicate Delete Add Disable If

Selected Element Index

Transfer/Export to another System (Original Version) IDTRANSFERTOICS

Attributes Printing Views

Element Identifiers Control ID: IDTRANSFERTOICS

Element Details Caption Extra Text

Question Layout Position Default

The new transfer element will then need to be added to the form. This is found in Library under the *Transfer to ICS* title.

Errors (0) Warnings (1) Library Search

**Library**

- Form Elements
  - Basic Elements
  - Transfer to ICS
    - New Transfer
      - Transfer/Export to another System (New Transfer Process) IDTRANSFERTOICS
    - Original Transfer
    - ECAF Demographics
  - Standard Choices

This should be dragged to the relevant section of the form, or select *Copy*, and back in the form *Paste Into*. The element will then be displayed in the form as below.

**Note:** the preview of the element may differ per customer but it is the correct element.

Once all changes to the form have been made the form should then be saved and closed. This new form can then be released for Testing, approved and released into the relevant environments when ready.

For more information on using the Customer Form Repository and amending forms, please refer to the **Customer Form Repository User Guide** available on the WIKI.

If a customer does not have the CFR installed in eCAF Liquidlogic are able to undertake this work for a charge. Please raise a JIRA UAT call specifying the requirements for this form.

# Enabling the process in ICS

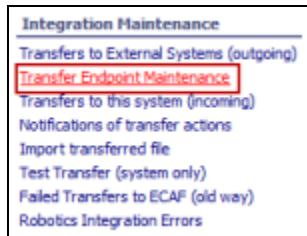
There are a number of tasks a Systems Admin worker would need to undertake to enable the process within ICS, and these are described below. This process is similar to that described above.

## System Configuration Maintenance

Within System Configuration Maintenance there is a category titled *Transfers*. Within this the site will need to set the *Enable External Transfers (new)* setting to Yes.

System Configuration		
The following is a list of the editable system configuration settings for site Doncaster ECAF		
Category	Description	Current Value
1	Transfers	Enable External Transfers (new)
2	Transfers	Debug External Transfers (new)

## Transfer Endpoint Maintenance



This maintenance option, accessed from the main menu, allows a customer to define the endpoint of the transfer. For customers using the transfer process already this will have entries within which show the existing endpoints.

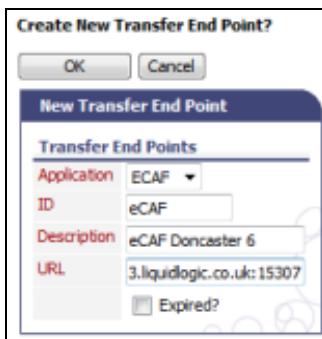
These can be overridden if required, and the same process should be undertaken as if creating a new Endpoint.

## Creating a new Transfer Endpoint

To create a new Transfer Endpoint, navigate to the *Transfer Endpoint Maintenance* menu option and click on *New*.



The details should then be filled out, similar to below:



- Application** - The application is a drop down and will provide the available applications to choose from. This will be the application the transfer is received in.
- ID** – This can be a brief ID made up by the customer site
- Description** – this should be the description of the receiving application

- **URL** – this should be the URL of the receiving system, up to and including the port number

Once these details have been added click **OK** and this will then return the user to the Endpoint Maintenance screen with the entry displayed in a list view.

Query Results (1)					
ID	Description	Expired?	Application	URL	
1	eCAF	eCAF Doncaster 6	No	ECAF	http://liquid-test3.liquidlogic.co.uk:15307

This process is then completed.

**Note:** there should only ever be one active endpoint, if there are multiple active endpoints then the transfer will not occur as the application will not know which system to transfer to. If there are more than 1 entry, then the invalid entries should be expired.

### **Adding the new Transfer Element to the form**

Once the set up has been completed the Transfer to eCAF form will need to be amended to add the new transfer element in place of the existing element.

**Note:** Customer forms may be named differently, and there may be multiple forms with this element in, so all forms will need amending when using the new transfer process. For the purpose of this document the form is called *Transfer to eCAF*.

### **Access the Customer Form Repository**

Firstly click on the *Customer Form Repository* link from the main menu.

Assessment Maintenance	
<a href="#">Customer Form Repository</a>	
<a href="#">Assessment Template Maintenance</a>	
<a href="#">Configure Assessment Types</a>	
<a href="#">Assessment Installer</a>	
<a href="#">Document Type Maintenance</a>	

When here, locate the relevant Referral to eCAF form(s) to be amended and select *Create a Customer Revision of this form*.

171 Placement Planning Meeting Minutes	Remote Liquidlogic Form
172 Pre CP Deregistration report	Environment Local System (8.0)
173 Private Fostering Arrangement Assessment Record	Form Referral to CAF v1 (1)
174 Private Fostering Arrangement Record (Visit Under Regulation 8)	Site(s) Liquidlogic Test
175 Prospective Adopters Report	Status Remote Liquidlogic Form
176 Record of Follow Up Strategy Discussion	Form Designer
177 Record of Outcome of 547 enquiries	► Open in Form Designer
178 Record of Strategy Discussion	New Revision
179 Referral Form for Birth Relatives	► Create a Customer Revision of this Form - v 1,1
180 Referral Record	► Mark this Form Revision (for copying)
181 Referral to ECAF	

### **Amending the form using Form Designer**

The new customer revision should be opened in Form Designer. When in the form the old transfer element will need to be deleted if it exists. However, it may not exist and therefore will not need to be deleted and therefore ignore this stage and progress to the stage below.

The new transfer element will then need to be added to the form. This is found in Library under the *ICS Forms – Transfer Forms* headings.

This should be dragged to the relevant section of the form, or select *Copy*, and back in the form *Paste Into*. The element will then be displayed in the form as below.

**Note:** the preview of the element may differ per customer but it is the correct element.

Once all changes to the form have been made the form should then be saved and closed. This new form can then be released for Testing, approved and released into the relevant environments when ready.

For more information on using the Customer Form Repository and amending forms, please refer to the **Customer Form Repository User Guide** available on the WIKI.

If a customer does not have the CFR installed in ICS Liquidlogic are able to undertake this work for a charge. Please raise a JIRA UAT call specifying the requirements for this form.

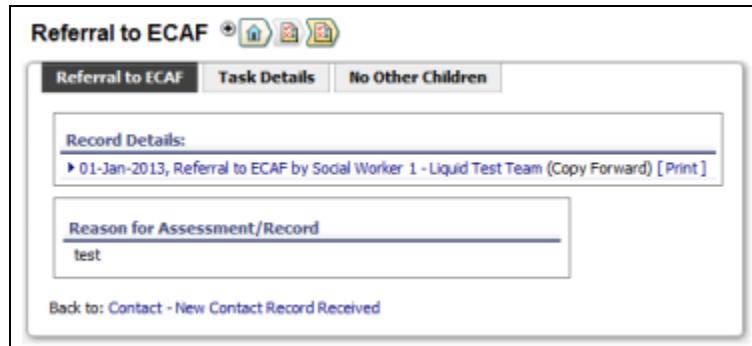
# Completing a transfer

## Transferring from ICS to eCAF

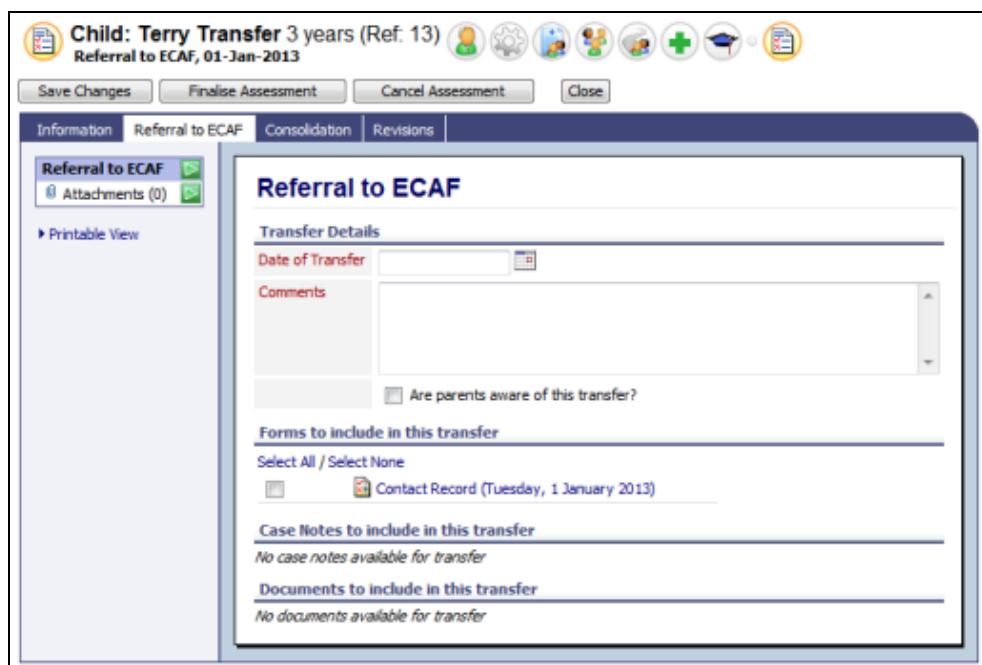
### Starting the Transfer process in ICS

The transfer process in ICS can be started from many different locations, for example, as an outcome of the Contact Record. For more information about this please see the eCAF / ICS Transfer Configuration Document, where this can be specified.

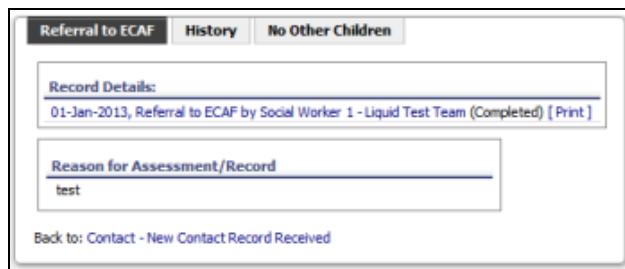
Once the decision to complete the transfer has been started the Transfer stage will become active with the transfer form available.



The form should then be opened and can be completed selecting the relevant forms, documents and case notes to also transfer.



Once the form has been completed the Transfer will take place.



### ***Transfer to External System menu option***

The user will not see anything in the application to confirm the transfer has taken place. It is, however, possible for a user with an Admin profile to do this as outlined below.

Navigate to the *Transfers to External Systems (outgoing)* link on the main menu.

- Integration Maintenance
  - Transfers to External Systems (outgoing)**
  - Transfer Endpoint Maintenance
  - Transfers to this system (incoming)
  - Notifications of transfer actions
  - Import transferred file
  - Test Transfer (system only)
  - Failed Transfers to ECAF (old way)
  - Robotics Integration Errors

When here, the user is able to search for all transfers or a specific person. The list of results will be displayed in the search and within the table shows the status of the transfer.

Transfers to External Systems (outgoing)													
Query		Results											
<a href="#">Printable View</a>													
Query Results (1)													
•	To	ID	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status	Reason For Failure			
1	ECAF	9	9	13	Terry	Transfer		01-Jan-2010	Successful				

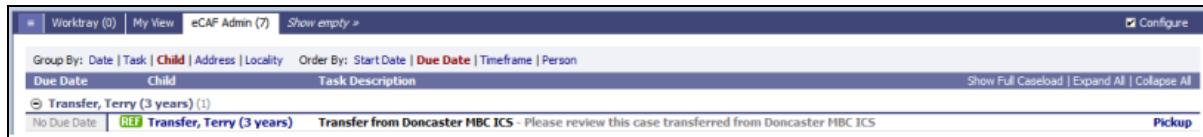
- Successful – this means the transfer has been successful and a task will now show in eCAF in the configured group tray.
- Pending – this means that the transfer has not yet been sent to eCAF. This will occur when looking at the transfer soon after it has been created, as a service is run at a set number of minutes. If, for any reason, a transfer had taken place 24 hours previously, but is still showing as pending this may be an issue with the systems and Liquidlogic should be contacted stating the time the transfer was started, and this will then be investigated.
- Failed – this will show if the transfer has failed for any reason. If it does fail it will provide a reason for failure. See section on Failed Transfers for more information.

Clicking on a result will bring up another screen showing the transfer in more detail, such as the person details as well as what forms were included in this transfer.

Transfer to eCAF	
<b>Transfer Status</b>	
Transfer ID	9
Status	Successful
► <a href="#">Resubmit all failed transfers</a>	
► <a href="#">Back to List of transfers</a>	
<b>Person Details</b>	
Forename	Terry
Surname	Transfer
Date of Birth	01-Jan-2010
<b>Transfer Details</b>	
Destination System	eCAF
Transfer Date	
Are the parents aware of this transfer?	No
Comments	
Recipients	
<b>Forms included in this transfer</b>	
 <a href="#">Referral to eCAF (Tuesday, 1 January 2013)</a>	
<b>Other Items (e.g. Case Notes) included in this transfer</b>	
► <a href="#">Open Person Record</a>	

## Receiving the transfer in eCAF

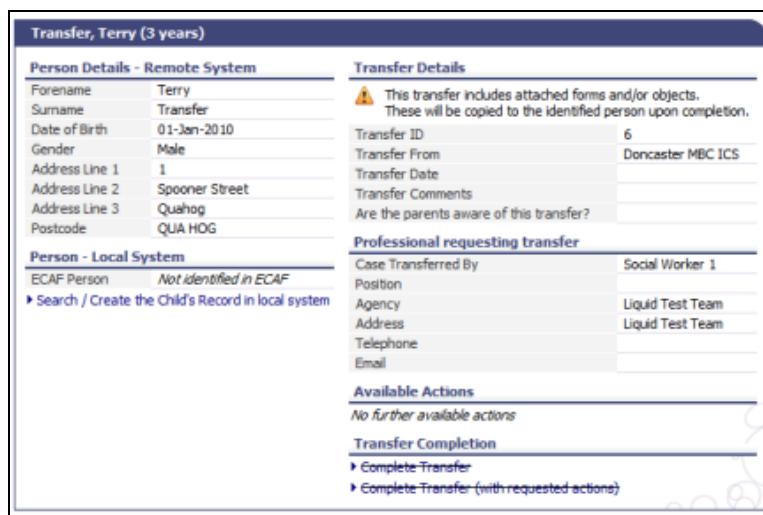
When the transfer has been successful a transfer task will show in the receiving group tray as shown below.



The screenshot shows the eCAF Worktray interface. At the top, there are buttons for 'Worktray (0)', 'My View', and 'eCAF Admin (7)'. Below these are filters for 'Group By: Date | Task | Child | Address | Locality' and 'Order By: Start Date | Due Date | Timeframe | Person'. The main area shows a transfer task titled 'Transfer, Terry (3 years)'. The task description is 'Transfer from Doncaster MBC ICS - Please review this case transferred from Doncaster MBC ICS'. There are buttons for 'Show Full Caseload', 'Expand All', 'Collapse All', and 'Pickup'.

By default the group tray that the transfer tasks are sent to is set with the group ID of *ECAFADMIN*. If a site wishes to change this, it can be done as part of configuration when completing the configuration document. However, if a site wishes to just make a change to the receiving group tray then a JIRA UAT should be raised specifying the details.

Any user with access to this group will be able to pick up the Transfer task. When picked up the user will be presented with the below screen.



The screenshot shows the details of a transfer task for 'Transfer, Terry (3 years)'. The 'Person Details - Remote System' section includes fields for Forename (Terry), Surname (Transfer), Date of Birth (01-Jan-2010), Gender (Male), Address Line 1 (1), Address Line 2 (Spooner Street), Address Line 3 (Quahog), and Postcode (QUA HOG). The 'Person - Local System' section shows 'ECAF Person' as 'Not identified in ECAF' and provides a link to 'Search / Create the Child's Record in local system'. The 'Transfer Details' section contains a warning about attached forms and objects, Transfer ID (6), Transfer From (Doncaster MBC ICS), Transfer Date, Transfer Comments, and a question about parent awareness. The 'Professional requesting transfer' section lists Case Transferred By (Social Worker 1), Position (Liquid Test Team), Agency (Liquid Test Team), Address (Liquid Test Team), Telephone, and Email. The 'Available Actions' section shows 'No further available actions'. The 'Transfer Completion' section includes links for 'Complete Transfer' and 'Complete Transfer (with requested actions)'.

## Search for the child in eCAF

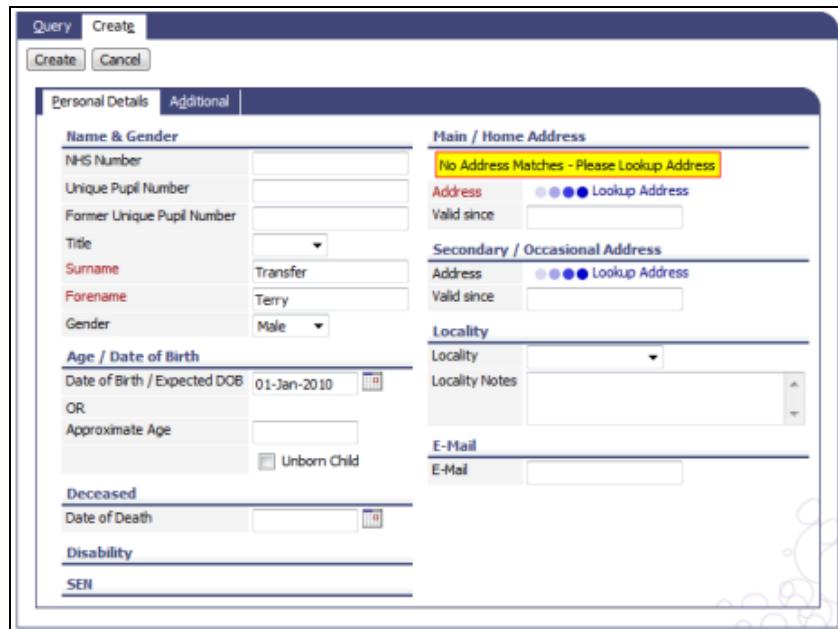
Click on the *Search / Create the Child's Record in local system* to search for the child in the system. This will then populate the search screen with details copied across from ICS.



The screenshot shows the 'Find Person in ECAF' search interface. It includes a 'Query' section with 'Search', 'Reset', and 'Create' buttons. The 'Person' section contains fields for ID, NHS Number, Surname (Transfer), Forename (Terry), and a checkbox for 'Show My Involvements'. The 'Age / Date of Birth' section includes Date of Birth (01-Jan-2010), Age, and Gender (Male). The 'Address' section includes House No. or Name (1), Street (Spooner Street), Town (Quahog), and Post Code (QUA HOG).

If no results are displayed the completed fields should be reduced to complete a full search of the system, as for example, the client may exist but at a different address.

When it is confirmed that the person does not exist in the application the child should be created. When in the create screen the system will automatically populate the information possible, and if the address already exists in the application this will also be populated. However, if the address does not exist this will be shown, and the address will need to be created.



## Completing the transfer

Once the child has been created the Transfer can be completed by clicking on the link shown below.

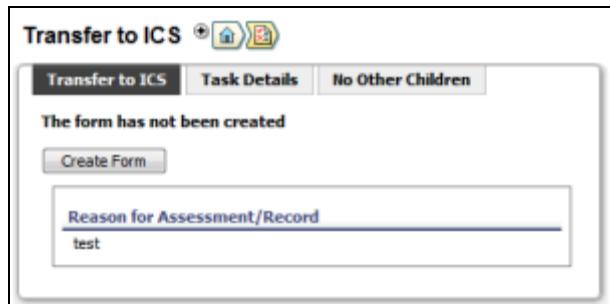


The Transfer is then complete and the child record exists in the eCAF application. The child can then be searched for and an episode started if this is what is required.

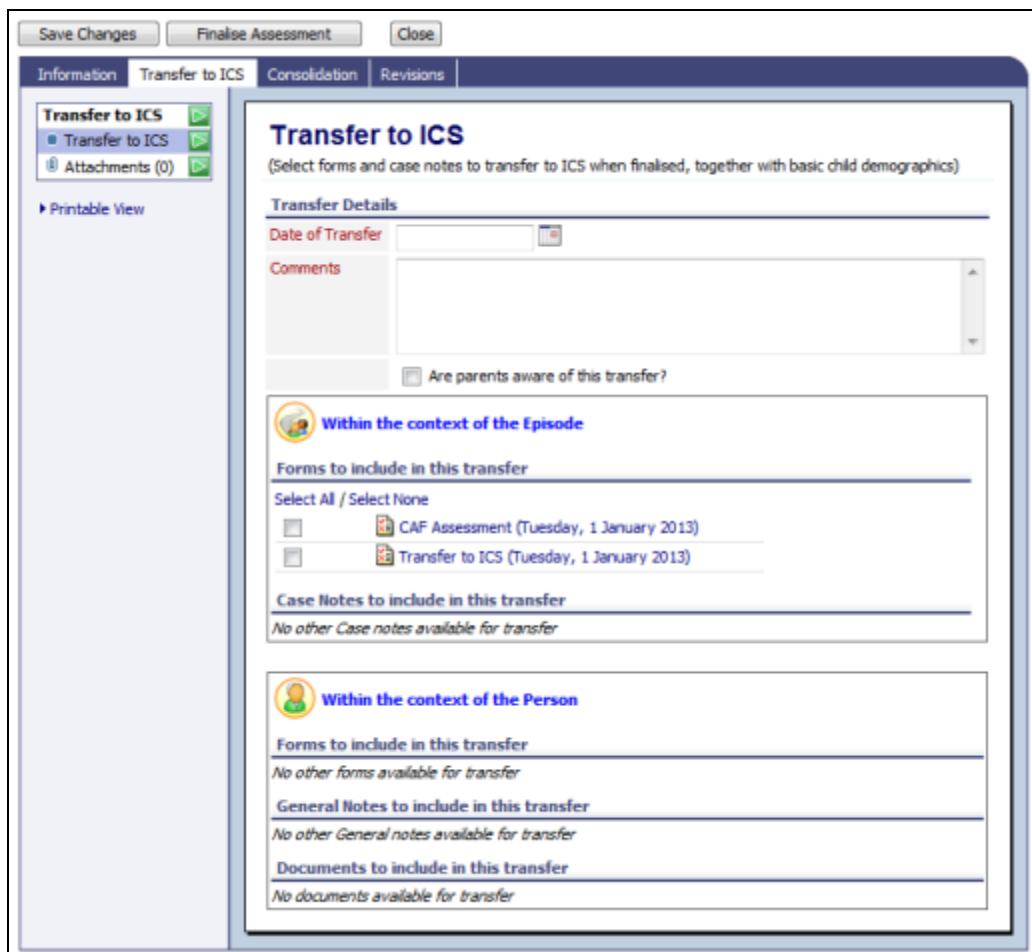
## Transferring from eCAF to ICS

### Starting the Transfer process in eCAF

The Transfer process in eCAF is usually started from within the workflow, however, it can also be started (if requested) from a standalone form or from within a workspace form.



The form should then be opened and can be completed selecting the relevant information from eCAF to transfer across to ICS. The available information to transfer can be restricted. For further information on this please see the eCAF / ICS Transfers Configuration document.



Once the form has been completed the Transfer will take place.

#### Transfer to External System menu option

The user will not see anything in the application to confirm the transfer has taken place. It is, however, possible for a user with an Admin profile to do this as outlined below.

Navigate to the *Transfers to External Systems (outgoing)* link on the main menu.

When here, the user is able to search for all transfers or a specific person. The list of results will be displayed in the search and within the table shows the status of the transfer.

Transfers to External Systems (outgoing)															
Query		Results													
Printable View															
Query Results (2)															
•	To	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status							
2	ICS	4		5	Tiffany	Transfer	01-Jan-2013	Successful							

- Successful – this means the transfer has been successful and a task will now show in eCAF in the configured group tray.
- Pending – this means that the transfer has not yet been sent to eCAF. This will occur when looking at the transfer soon after it has been created, as a service is run at a set number of minutes. If, for any reason, a transfer had taken place 24 hours previously, but is still showing as pending this may be an issue with the systems and Liquidlogic should be contacted stating the time the transfer was started, and this will then be investigated.
- Failed – this will show if the transfer has failed for any reason. If it does fail it will provide a reason for failure. See section on Failed Transfers for more information.

Clicking on a result will bring up another screen showing the transfer in more detail, such as the person details as well as what forms were included in this transfer.

Refer to Social Care

<b>Transfer Status</b>	
Transfer ID	4
Status	Successful
► Resubmit all failed transfers	
► Back to List of transfers	
<b>Person Details</b>	
Forename	Tiffany
Surname	Transfer
Date of Birth	01-Jan-2013
<b>Transfer Details</b>	
Destination System	ICS
Transfer Date	
Are the parents aware of this transfer?	No
Comments	
Recipients	
<b>Forms included in this transfer</b>	
Transfer to ICS (Tuesday, 1 January 2013)	
<b>Other Items (e.g. Case Notes) included in this transfer</b>	
► Open Person Record	
► Open Related Episode	

## Receiving the transfer in ICS

When the transfer has been successful a transfer task will show in the receiving group tray as shown below.

Worktray (29) My View Administration (12) Team Manager 1 (13) Show empty » Configure

Group By: Date | Task | Person | Address | Referral Group Order By: Start Date | Due Date | Timeframe | Person

Due Date	Person	Task Description	Actions
Transfer from Doncaster ECAF ECAF (2)	Transfer, Tiffany (2 weeks)	Transfer from Doncaster ECAF ECAF - Please review this case transferred from Doncaster ECAF ECAF	Pickup
No Due Date			

By default the group tray that the transfer tasks are sent to is set with the group ID of *ADMIN*. If a site wishes to change this, it can be done as part of configuration when completing the configuration document. However, if a site wishes to just make a change to the receiving group tray then a JIRA UAT should be raised specifying the details.

Any user with access to this group will be able to pick up the Transfer task. When picked up the user will be presented with the below screen.

Transfer, Tiffany (2 weeks)

<b>Person Details - ECAF</b>	<b>Transfer Details</b>
Forename: Tiffany	⚠ This CAF transfer includes attached forms and/or objects
Surname: Transfer	Transfer Date: 02-Jan-2013
DOB: 01-Jan-2013	Transfer Comments: This case is transferring to ICS for further Social Care involvement
Gender: Female	Are the parents aware of this contact?
House No or Name: 23	Do you wish to remain anonymous?
Street: Sty Street	
Town: Styville	
Postcode: ST7 8YE	
Ethnicity:	<b>Professional requesting transfer</b>
Immigration Status:	Professional: ECAF Worker 1
Religion:	Position:
<b>ICS Person</b>	Agency: ECAF Liquid Test Team
ICS Person: Not identified in ICS	Address: ECAF Liquid Test Team
► Search / Create the Child's Record in ICS	Telephone:
	Email:
	<b>Actions</b>
You cannot create the contact until you have selected or created the ICS Person	

## Search for the child in ICS

A matching process will then need to be undertaken to match the child to an existing record or to create a new record. Click on the *Search / Create the Child's Record in ICS* to search for the child in the system. This will then populate the search screen with details copied across from eCAF.

**Find Person in ICS**

Query    Query Types:  Basic  Default

<b>Name</b>	
Surname	Transfer
Forename	Tiffany
<input type="checkbox"/> Include records that sound similar	
<b>References</b>	
System ID	
NHS Number	
Unique Pupil Number	
Home Office Registration	
National Insurance Number	
YOT Number	
Court Case Number	
<b>Age / Date of Birth</b>	
Date of Birth	01-Jan-2013
Age	
Type	<input type="button"/>
Gender	Female <input type="button"/>
<b>Address</b>	
House No. or Name	23
Street	Sty Street
Town	Styville
Post Code	ST7 8YE
<input checked="" type="checkbox"/> Search Previous Addresses?	
<b>Child Protection Plan</b>	
Status	<input type="button"/>
Start Date	<input type="button"/>
End Date	<input type="button"/>
<b>Child Looked After</b>	
Status	<input type="button"/>
CLA Start Date	<input type="button"/>
CLA End Date	<input type="button"/>
<b>Referral</b>	
Status	<input type="button"/>
Referral Start Date	<input type="button"/>
Referral End Date	<input type="button"/>
<b>Involvements</b>	
Case Worker	<Click here to select a user>
Designated Manager	<Click here to select a user>
Case Worker's Team	<Click here to select a department>
<b>Other Fields</b>	
Child In Need Code	<input type="button"/>
Legal Status	<input type="button"/>

If no results are displayed the completed fields should be reduced to complete a full search of the system, as for example, the client may exist but at a different address.

When it is confirmed that the person does not exist in the application the child should be created. When in the create screen the system will automatically populate the information possible, and if the address already exists in the application this will also be populated. However, if the address does not exist this will be shown, and the address will need to be created.

## Completing the transfer

Once the child has been created the Transfer can be completed and a Contact Record started for the child.

Transfer, Tiffany (2 weeks)

<b>Person Details - ECAF</b>		<b>Transfer Details</b>
Forename	Tiffany	<b>⚠ This CAF transfer includes attached forms and/or objects</b>
Surname	Transfer	Transfer Date 02-Jan-2013
DOB	01-Jan-2013	Transfer Comments This case is transferring to ICS for further Social Care involvement
Gender	Female	Are the parents aware of this contact?
House No or Name	23	Do you wish to remain anonymous?
Street	Sty Street	
Town	Styville	
Postcode	ST7 8YE	
Ethnicity		
Immigration Status		
Religion		
<b>ICS Person</b>		
ICS Person	Child: Tiffany Transfer	
<a href="#">► Find another ICS Person</a>		
<b>Actions</b>		
<a href="#">► Create new Contact</a>		

The Transfer in ICS is then completed for this child and a Contact Record is started. This can be completed in the standard way.

## Contact Record

When the contact record is being completed after the transfer, dependant on a customer's fields, information is automatically populated into multiple fields to state it is a record from eCAF.

Save Changes Finalise Record Cancel Record Close

<b>Information</b>	<b>Contact Record</b>
<a href="#">Consolidation</a> <a href="#">Revisions</a>	
<b>Contact Record</b>	
<b>Details of person making contact</b>	
Who has made contact?	Any other Professional
<b>Complete the details of the External Agency or Professional</b>	
Professional	ECAF Worker 1
Position	
Agency	ECAF Liquid Test Team (ECAF System)
Address	ECAF Liquid Test Team
Telephone	
Does this person wish to remain anonymous?	<input type="radio"/> Yes <input type="radio"/> No
<b>Method of Contact</b>	
Time of Contact	<input type="radio"/> Normal working hours <input type="radio"/> Out of Hours - Evening <input type="radio"/> Out of Hours - Morning
Contact Method	
Reason for Contact	Notice of other agency contact with child/young person
Further Details	Transferred from ECAF system. ECAF Professional sent the following details: This case is transferring to ICS for further Social Care involvement
<b>Further Information</b>	
Source Type	
Contact Outcome Code	
Contact Reason Code	
<b>Further Action</b>	
Suggested Outcomes	<input type="checkbox"/> Progress to Referral <input type="checkbox"/> Link to Existing Referral <input type="checkbox"/> Non-Agency Adoption—Ensure there is an Allocated Case Worker <input type="checkbox"/> Enquiry of CP <input type="checkbox"/> Provision of Information/Advice <input type="checkbox"/> Referral to Other Agency
Reasons for these Suggested Outcomes	
Contact Decision Date	

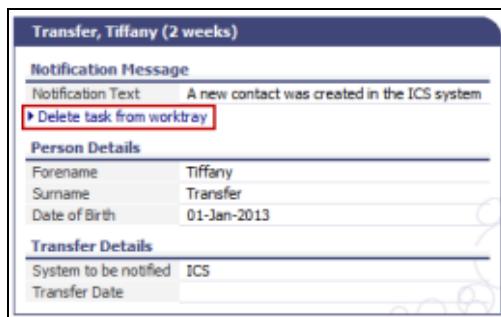
## Notification of Contact started in ICS

When an ICS contact is started on the child transferred to ICS, the system will automatically send a notification to the eCAF worker completing the transfer, which will appear as a task in their work tray.



The screenshot shows the eCAF Worktray interface. At the top, there are buttons for 'Worktray (5)', 'eCAF Admin (6)', and 'Show empty >'. On the right, there is a 'Configure' button. Below these are filters: 'Group By: Date | Task | Child | Address | Locality' and 'Order By: Start Date | Due Date | Timeframe | Person'. The main area shows a task for 'Transfer, Tiffany (2 weeks)'. The task details are: 'No Due Date' and 'REF Transfer, Tiffany (2 weeks)'. A red box highlights the 'Notification from ICS - A new contact was created in the ICS system' message. At the bottom right of the task card, there is a link 'Delete task from worktray'.

Clicking on this task will bring up the following screen.



The screenshot shows the 'Transfer, Tiffany (2 weeks)' details screen. It includes sections for 'Notification Message' (with the message 'A new contact was created in the ICS system' and a 'Delete task from worktray' link), 'Person Details' (Forename: Tiffany, Surname: Transfer, Date of Birth: 01-Jan-2013), and 'Transfer Details' (System to be notified: ICS, Transfer Date: [redacted]).

Once satisfied that no further work needs to be done, the *Delete Task* link as shown above should be clicked. The user will be provided with a confirmation message:



The task will be removed from the work tray and no further tasks will be automatically generated from either system and the transfer process is now completed.

## Notification of Contact progressing to NFA in ICS

When the ICS user completes the Contact Record, if *No Further Action* is chosen as the outcome a notification is sent to the eCAF worker completing the process. This shows as a task in the eCAF users work tray.



The screenshot shows the eCAF Worktray interface. At the top, there are buttons for 'Worktray (5)', 'eCAF Admin (6)', and 'Show empty >'. On the right, there is a 'Configure' button. Below these are filters: 'Group By: Date | Task | Child | Address | Locality' and 'Order By: Start Date | Due Date | Timeframe | Person'. The main area shows a task for 'Test, Transfer (2 years)'. The task details are: 'No Due Date' and 'REF Test, Transfer (2 years)'. A red box highlights the 'Notification from ICS - No further action was taken from the contact that is linked to the case you transferred to ICS' message. At the bottom right of the task card, there is a link 'Delete task from worktray'.

Clicking on the task brings up the below screen where the task can be deleted from the worktray when necessary.

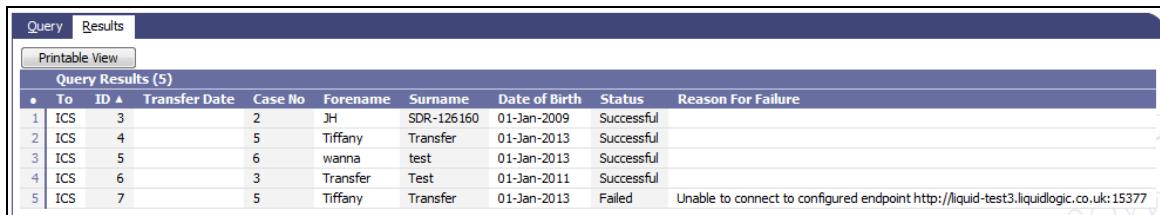


The screenshot shows the 'Test, Transfer (2 years)' details screen. It includes sections for 'Notification Message' (with the message 'No further action was taken from the contact that is linked to the case you transferred to ICS' and a 'Delete task from worktray' link), 'Person Details' (Forename: Transfer, Surname: Test, Date of Birth: 01-Jan-2011), and 'Transfer Details' (System to be notified: ICS, Transfer Date: [redacted]).

## Failed Transfers

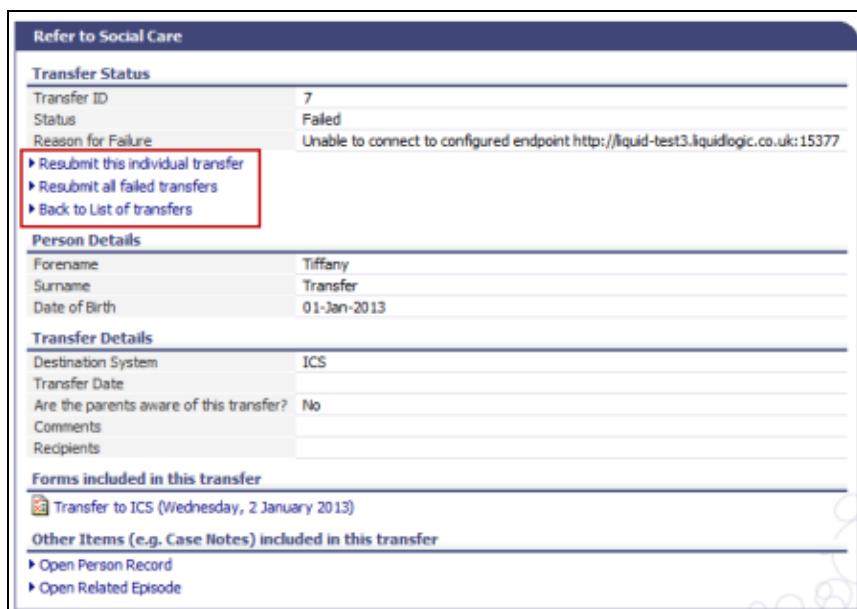
As stated earlier in this document, there may be occasions when a transfer fails between the 2 applications. These can be identified when searching in the *Transfers to External Systems (outgoing)* menu option. A user can complete a search for all transfers, specific transfers or just for transfers dependant on their status.

When in the results screen it is possible to see the transfer that failed, and the reason.



To	ID	Transfer Date	Case No	Forename	Surname	Date of Birth	Status	Reason For Failure
ICS	3		2	JH	SDR-126160	01-Jan-2009	Successful	
ICS	4		5	Tiffany	Transfer	01-Jan-2013	Successful	
ICS	5		6	wanna	test	01-Jan-2013	Successful	
ICS	6		3	Transfer	Test	01-Jan-2011	Successful	
ICS	7		5	Tiffany	Transfer	01-Jan-2013	Failed	Unable to connect to configured endpoint http://liquid-test3.liquidlogic.co.uk:15377

Click into on the failed transfer and it will bring up further details regarding the transfer as well as available actions.



Transfer Status

Transfer ID: 7  
Status: Failed  
Reason for Failure: Unable to connect to configured endpoint http://liquid-test3.liquidlogic.co.uk:15377

Resubmit this individual transfer  
Resubmit all failed transfers  
Back to List of transfers

Person Details

Forename: Tiffany	Surname: Transfer
Date of Birth: 01-Jan-2013	

Transfer Details

Destination System: ICS	Transfer Date:
Are the parents aware of this transfer? No	
Comments:	Recipients:

Forms included in this transfer

Transfer to ICS (Wednesday, 2 January 2013)

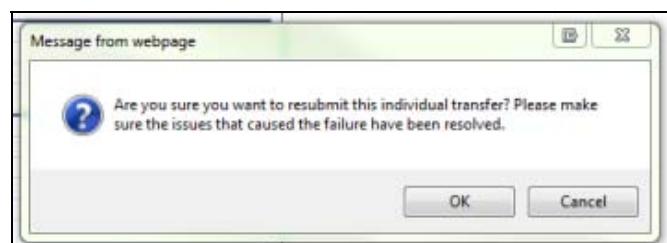
Other Items (e.g. Case Notes) included in this transfer

Open Person Record  
Open Related Episode

It is then possible to resubmit this failed transfer, or all failed transfers.

## Resubmitting Individual Transfers

Clicking on the link to resubmit the individual transfer will bring a pop up box to confirm you wish to progress with this. Click OK and the transfer will resend the next time the transfer service runs.

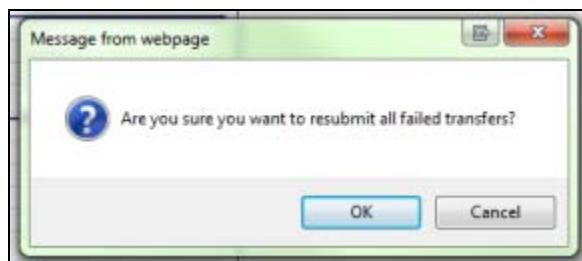


Whilst the transfer service is running the status will change to pending.

Refer to Social Care	
<b>Transfer Status</b>	
Transfer ID	7
Status	Pending
► Resubmit all failed transfers	
► Back to List of transfers	
<b>Person Details</b>	
Forename	Tiffany
Surname	Transfer
Date of Birth	01-Jan-2013
<b>Transfer Details</b>	
Destination System	ICS
Transfer Date	
Are the parents aware of this transfer?	No
Comments	
Recipients	
<b>Forms included in this transfer</b>	
Transfer to ICS (Wednesday, 2 January 2013)	
<b>Other Items (e.g. Case Notes) included in this transfer</b>	
► Open Person Record	
► Open Related Episode	

## Resubmitting All Transfers

Clicking the link to resubmit all transfers will, again, bring up a confirmation box. Click OK and the transfer will resend the next time the transfer service runs.



Whilst the transfer service is running the status will change to pending.

## Failure Reasons

The transfer may fail for a number of reasons. Firstly ensure that all the configuration settings are correct as explained in this manual. Secondly ensure both services are running. The receiving application may not be running for a certain reason and this will cause a failure.

## What to do if transfers continue to fail

When transfers fail, and they are resubmitted for transfer, if all the configuration is set up correctly, and the applications are running but failures are still occurring then Liquidlogic should be contacted who will be able to investigate the failure reason further. Liquidlogic would need to know the following:

- The application transferring from and to
- The case number of the case being transferred
- The date and time the transfer was sent from the application

Liquidlogic would need to dial in to the application and retrieve the log file to investigate why the transfer failed and fix the issue.